Learning Management System (LMS)

Manager Mode

User Guide

July 3, 2014

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Getting Started

Navigation

Home Page (My Courses - Recently Accessed Courses)

After logging in, the first page you'll see is My Courses. This page opens to a list of your Recently Accessed Courses. If you haven't worked on courses within the last XXXXX MONTHS, the list will be empty.

Comment [ovhw1]: Studies show that documents with a familiar writing style are more easily understood and remembered.

Comment [ovhw2]: How long?

Figure 1: Home/My Courses/Recently Accessed Courses page.

Engage Manager Mode

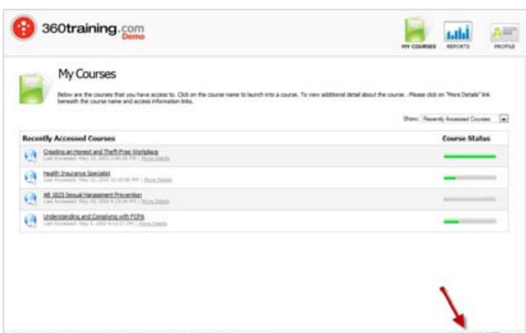


Figure 2: To engage Manager Mode, click the drop-down box on the bottom right of the screen.

Next/Back Buttons

To move ahead or back while taking a class, click on the Next  button or the Back  button on the bottom right of the screen. Each click advances or retreats one page.

Figure 3: Next / Back buttons.

Navigation Bar

The navigation bar is in the upper right of the screen. It provides access to Users & Groups, Courses, Reports, Surveys, Announcements and Profile.

Figure 4: Navigation Bar.

Users & Groups

Manager Mode Home / Manage Users / Users & Groups

Comment [ovhw3]: No help button?

As listed on the right of the page, Users & Groups provides access to the following actions:

- Manage Users
- Batch Import Users
- Registration Invitation
- Manage Org Groups
- Manage Learner Groups
- Manage Security Roles
- Assign Security Roles

Manage Users

The first Manager Mode page is the Manage Users page, a component of the Users & Groups  page. This is the main control page for Manager Mode.

Figure 5: Manage Users page.

Via the search function, the Manage Users page provides a list of the users in your domain and top line information about each one, including: first name, last name, account name and whether or not the user's account is locked. To access this information, review the Search instruction below.

ADD, DELETE, SEARCH FOR USERS

The Users & Groups Page allows you to search, add or delete or search users.

Figure 6: Add, Delete, Search for users.

Add a User

On the Manage Users page, click the blue Add User button . The Add New User – Information screen will appear. When you first add users, it would be useful to first Manage Learner Groups and Manage Org Groups. Bars for this are on the left of the Manage Users screen. See details in the Manage Learner Groups and Manage Org Groups sections of this document.

Three steps are required to add a user:

- Insert the mandatory information
- Assign Organization Group and Learners Groups
- Confirm your entries. New User information is not saved until you hit finish  at the end of the process.

Comment [ovhw4]: Can a whole group be easily shown on the Manage Users page?

I tried hitting the tiny icon on the upper right with the roll-over text "Show All" and got "No records found…". At that point, I had plenty of records. What did I do wrong? Once this is cleared up, I'll add the info on it.

Comment [ovhw5]: It might be useful to have upper right icons on every page, including the internal pages of Add, Delete, Search. Just in case someone decides that they want to check something or do something else before proceeding.

Add New User - Information

On the Add New User – Information screen, insert the mandatory information indicated by the * symbol, as well as any other information you would like to add.

On the bottom of this screen, in the Login Information and Account Settings area, you are required to enter User Name and Password; and may also input additional account settings, including: Account Locked, Account Expired, Account Disabled, Visible on Reports, Change Password on Next Login, and an Expiration Date. If you have Custom Settings, they will appear in the bottom section of this page. When you have inserted the necessary information, scroll down and hit the blue Next button NEXT, which is located on the bottom right of the screen.

NOTE: Passwords are case sensitive, must be at least 8 characters, and must contain both letters and numbers.

Figure 7: Add New User – Information page; User Profile.

Add New User - Groups

On the Add New User – Groups page, you can assign the new user to appropriate groups. The top of the screen presents Organization Groups. You must assign each new user to at least one Organization Group.

Below the Organization Group assignment area is a double-sided box. Items on the left side of the box titled "Available Learner Group" are those learner groups available to be assigned to that user.

Scan the list and select the appropriate group assignment for that user. Assign the user to that group by single-clicking on the group and pressing the right arrow to move the item into the right side box. If you decide not to assign that group to the user, single-click the group in the right box and press the left arrow. You can only assign one Learner Group at a time, but the process can be repeated to assign as many Learner Groups as necessary. When you have finished assigning Organization and User Groups, click Next NEXT on the bottom right of the page.

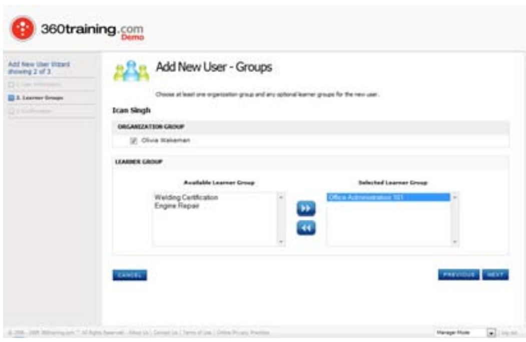


Figure 8: Add New User – Learner Groups.

New User - Confirmation

The third step in adding a new user is confirming that the information you entered is correct. From the Add New User – Groups page, you will be taken to the Add New User – Confirmation screen. This will allow you to review your input for accuracy. If you need to make corrections, hit the previous button PREVIOUS at the bottom of the screen. If everything is correct, hit the finish button FINISH also located at the bottom of the screen.

NOTE: You must hit the Finish FINISH button to save your submission.

Figure 9: Add New User - Confirmation

Delete a User

To delete a user, on the Manage Users page click on the user(s) to be deleted. Click the blue button labeled Delete User DELETE USER. You will then be asked to confirm the deletion. Hit OK and the entry will be deleted.

Search for a User

To search for a user in your database, click the Search button SEARCH in the center of the upper portion of the screen. This button will activate the search dialog box. The box will request that you input the first name, last name and/or email address of the person you are trying to locate. If this person is found, the record will appear in your Manage Users list. If not, the following message will appear on your Manage Users screen: "*No records found. Click on the search button to open up the search dialogue.*"

Figure 10: Search Dialog Box.

Batch Import Users

Use the Batch Import Users tool to create or update user accounts using a data spreadsheet. Access Batch Import Users by clicking the second button on the left side of the Manage Users page. This button will take you to the Import Settings dialog box. From the Import Settings box, Browse BROWSE for your data file.

NOTE: Only 50 KB can be uploaded.

Comment [ovhw6]: at a time?

Before hitting Import IMPORT , you will be allowed to define your imported file. You will have the following clarification options: File Delimiter (comma, semicolon, pipe, tab), First Row is Header Row, Account Locked, Accounts Visible in Reports, Duplicate Records (Ignore/Update), Send Email Registration (Yes/No).

Click on the Sample File link below to open a CSV template. Open the template in a spreadsheet or database program and fill in the users you wish to import. Duplicates will be detected if the user has the same email address.

Figure 11: Batch Import Users - Import Settings dialog box.

SAMPLE IMPORT FILE

Batch Import Users also offers the option to click-through to view a sample import file. To see the file, click the sentece at the bottom of the page that says, “Click here for sample import file” Click here for a sample import file . This link activates a dialog box asking you to download a zipped file named LMS_Batch_Import.zip.

Comment [ovhw7]: Is this a sample file or a required template? It's tough to tell from the instructions on the batch page.
<<<

Figure 12: Batch Import Users – Save File Dialog Box.

Download, unzip and open the file. The file offers a shell creating your own database. One sample entry is provided to facilitate your formatting. There are 17 fields and each must be completed.

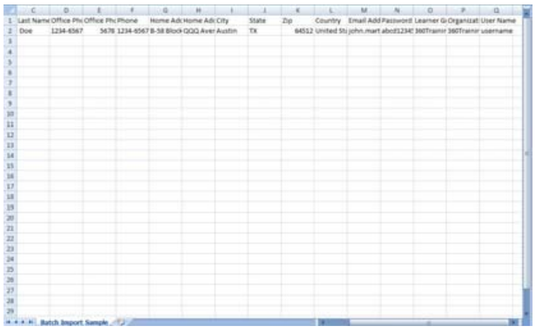


Figure 13: Batch Import Users – Sample Import File.

Once you have input your data. Save it and note the delimiter format you've selected. The LMS system allows the following file delimiters:

- Comma (,) - (.csv)
- Semicolon (;) -
- Pipe (|) -
- Tab – (.txt)

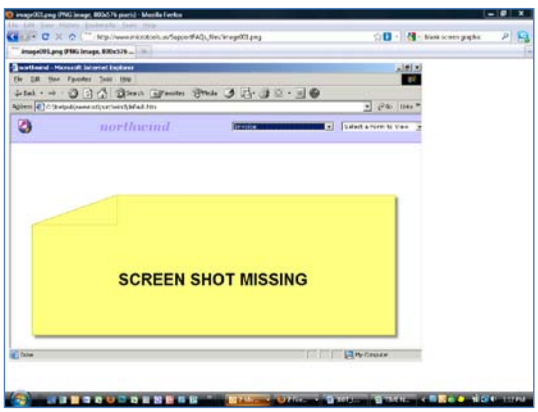
Comment [ovhw8]: What are the file extensions for these two?

After saving your data file, return to the Batch Import Users browser page. Hit the Browse button BROWSE and insert the file from your computer.

Figure 14: Batch Import – Browse.

Then, hit the Import button IMPORT at the bottom of the screen. If your data is correctly formatted,

Comment [ovhw9]: I was unable to do this. Even using only the info supplied by the 360T template.



If certain fields have been incorrectly completed, or not completed, you will receive an error message highlighting each error. To facilitate correction, you can print the page using the blue Print This Page button PRINT THIS PAGE near the top of the page.

Figure 15: Batch Import Users – Error Page.

Registration Invitation

The third button on the left of the Users & Groups page is Registration Invitation. This page allows you to email Registration Invitations directly to users in your organization. An invitation provides a special passcode-protected link to a learner registration form.

Figure 16: Registration Invitations page.

ADD AN INVITATION

New Registration - Information

To add an invitation, click on the Add Invitation button 

. This will take you to the New Registration – Information page. The New Registration – Information page allows you to invite new learners to join the system. The Registration Information form includes:

- Invitation Summary
- Organization Group
- Learner Group

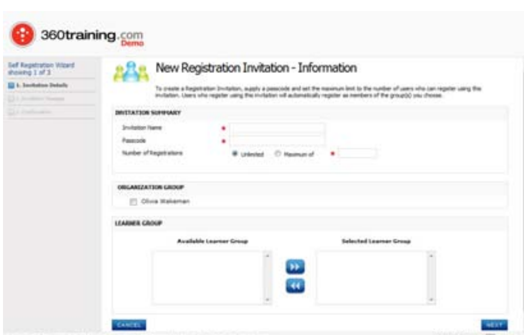


Figure 17: New Registration – Information page.

Invitation Summary

Invitation Summary includes three mandatory fields:

- Invitation Name: The name of the course or other activity prompting the invitation.

- Passcode : This is a code that you assign. It will be transmitted with the invitation to allow registering learners to use the invitation.
- Number of Registrations: The number of users who can register using this invitation.

Organization Group

In the Organization Group box, you will assign an organization group to the invitation. Organization Groups will be listed in this box and may be selected by clicking the box to the left of the Organization Group name.

Comment [ovhw10]: Can it be assigned to more than one Org Grp?

Learner Group

Once the Organization Group has been assigned, the Learner Group will be populated with available courses. Assign the appropriate courses for that Learner Group by highlighting the course on the left and clicking the right-facing assignment button located between the boxes. To remove a course that you have assigned, highlight it in the right box and click the left-facing button located between the boxes. To proceed, hit Next NEXT on the bottom right of the screen.

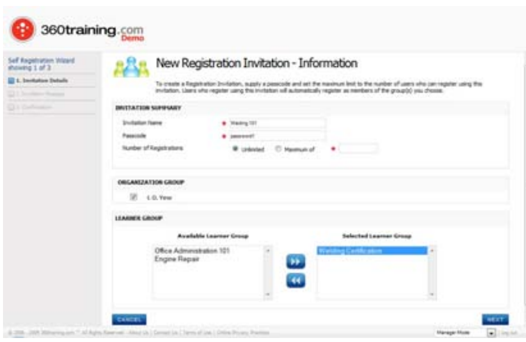


Figure 18: New Registration Invitation – Information – form completed.

New Registration Invitation - Message

From the New Registration Invitation – Information page, you will be directed to the New Registration Invitation –

Message page. Here you will be allowed to create a message to accompany your Registration Invitation. When you have composed your message, hit Next NEXT to proceed.

Figure 19: New Registration Invitation – Message page.

New Registration Invitation – Confirm Invitation

The third and final step in sending a New Registration Invitation is to confirm that your information is correct. A confirmation page follows the New Registration Invitation – Message screen.

Figure 20: New Registration Invitation – Confirm Invitation page.

Finalize your Invitation and send it by scrolling down and pressing the Finish button FINISH on the bottom right of the screen. If you would like to have a copy sent to yourself, check the box on the bottom left of the screen. Once you hit, Finish, your invitation will be sent and you will be returned to the Registration Invitations screen, where you will see a list of the invitations you have sent.

Comment [ovhw11]: On the side bar it's "Registration Invitation" and on the page it's "Registration Invitations." Do you want to standardize it?

Comment [ovhw12]: I didn't see this, but speculated. If I'm wrong, this should be changed. If I'm right the system may need a tweak.

If you would like to adjust your invitation before sending, scroll to the bottom of the screen and press the Previous button PREVIOUS next to the Finish button on the right of the screen. Return to the page you would like to change, then follow the prompts to advance.

Figure 21: Bottom of New Registration Invitation – Confirm Invitation page.

SEARCH REGISTRATION INVITATIONS

To find an invitation in your archives, press the Search button SEARCH . This will bring up a dialog box and allow you to search by Invitation Name.

Comment [ovhw13]: I didn't see a place to put in an Invitation Name.

Figure 1: Search Invitations dialog box.

DELETE AN INVITATION

To delete an invitation from your records, Search SEARCH for the invitation(s) (see above), select the invitation(s) to delete and click the Delete Invitation button DELETE INVITATION on the Registration Invitations page.

Figure 2: Delete Invitation button location.

> **Comment [ovhw14]:** I wasn't able to get a capture of this screen with an invitation checked because the invitation I sent didn't show up.
>
> I also wasn't able to continue the process to document it.

Before deleting an invitation, you will receive a deletion query. Press OK and your invitation(s) will be deleted.

Figure 3: Registration Invitation – deletion confirmation.

CANCEL AN INVITATION

If, at any time before sending, you would like to terminate the invitation process, hit Cancel CANCEL at the bottom left of the page.

Manage Organization Groups

> **Comment [ovhw15]:** Add Org Grp p. 2 of 2 says, "Please confirm the addition of a new Organization Group and click Save when finished." but the button below is not Save but Finish.

Manage Org Groups is the fourth category on the left navigation bar. It allows you to organize your users into groups to simplify training management and administration. Organization Groups can represent such subsets as, departments, divisions or project groups within your organization. A learner may be a member of more than one organization group. Organization Groups may facilitate training plan distribution or information on assigned course enrollments.

Figure 4: Manage Organization Groups first page.

ADD ORGANIZATION GROUPS

To add an Organization Group, begin by clicking the Add Organization Group button ADD ORGANIZATION GROUP. This will take you to the Add Organization Group – Group Name page.

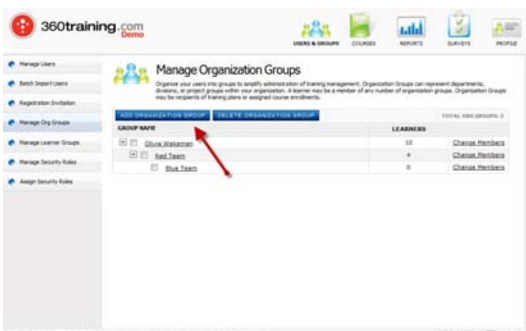


Figure 5: Add Organization Group button.

Figure 6: Add Organization Group – Group Name page.

On the Add Organization Group page, you will assign a group name and select the parent organization from the list provided in the Organization Group box.

NOTE: The system can handle multiple tiers. Sub-groups can also serve as parents to smaller subgroups.

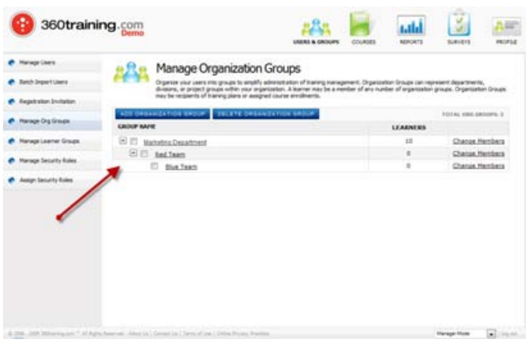


Figure 7: Organization Groups - multiple tiers.

RENAME ORGANIZATION GROUPS

To edit the name of an Organization Group, click on the name of the group that you would like to edit. This will take you to the Edit Organization Group page where you will be allowed to re-name the organization group you have selected.

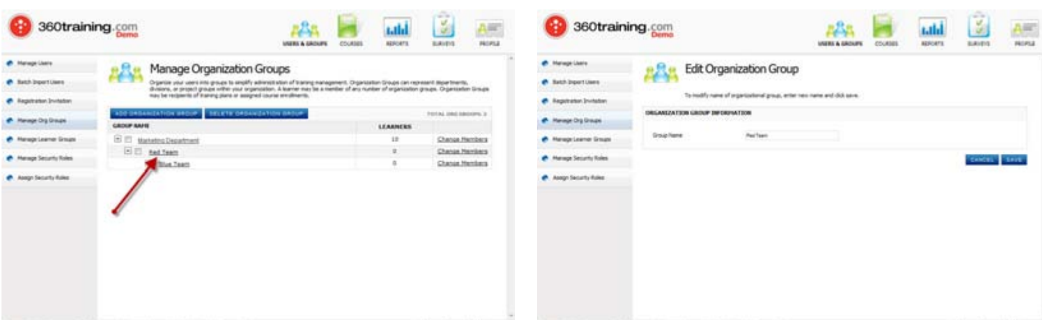


Figure 8: Rename an Organization Group.

DELETE ORGANIZATION GROUPS

To delete and Organization Group, on the Manage Organization Groups page, select the group to be deleted. The press Delete Organization Group button DELETE ORGANIZATION GROUP above the list of organization groups. A confirmation box will appear. Click OK and the group will be deleted.

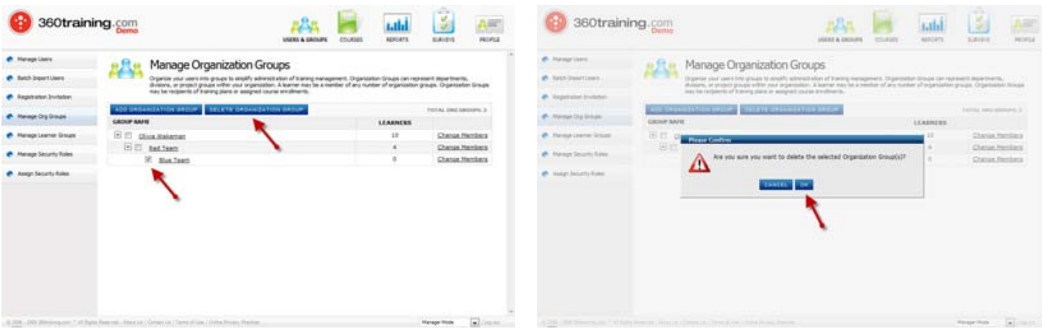


Figure 9: Delete an Organization Group.

MANAGE ORGANIZATION GROUP MEMBERS

To add, delete or change group members, click the Change Members click-through Change Members on the right of the main Manage Organization Groups page. From the Manage Organization Groups page, you will be able to add members to or delete members from a specific organization group.

Figure 10: Change Members click-through.

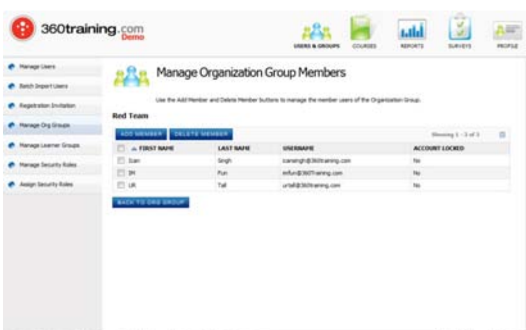


Figure 11: Manage Organization Group Members page.

Comment [ovhw16]: This area says, "No records found. Click on the search button to open up the search dialogue." But there is no search button.

Add Group Members

Add members to a group by pressing the Add Member button ADD MEMBER. This will take you to a page that will allow you to search for members to add. The screen will open to an error message: “No records found. Click on the search button to open up the search dialogue.” This prompts you to use the Search button SEARCH to locate your new member.

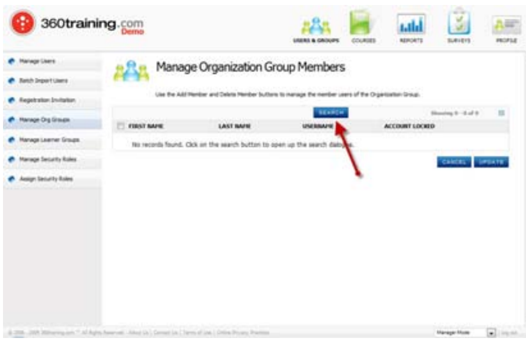


Figure 12: Search for learners to add to a group.

Clicking the Search button SEARCH activates a drop-down search dialog box. Using this box, you are able to search members by first name, last name, email address or any combination of the three.

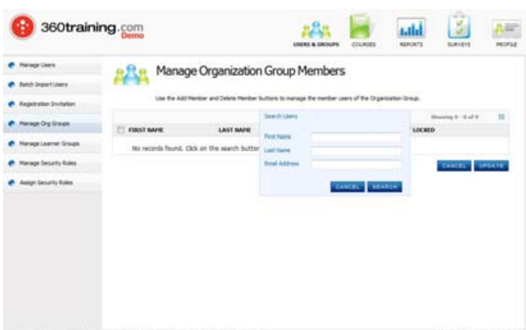


Figure 13: Search for members to add to a group.

Delete Group Members

To a delete group member, click the Manage Org Groups tab on the left navigation bar. Press the Change Members click through Change Members to the right of the page. This will take you to the Manage Users area. At Manage Users, select one or more users and press Delete User DELETE USER above the list of groups. A dialog box will appear asking for confirmation. Click OK and the members will be removed from that group.

Comment [ovhw17]: This note is at the top of this page, but there are no add or delete buttons on this page.

“Use the Add Member and Delete Member buttons to manage the member users of the Organization Group.”

Figure 14: Change Members click-through.

Figure 15: Manage Users page; Delete Organization Group users.

Figure 16: Delete Member dialog box.

Comment [ovhw18]: Through this section the site seems to refer to the same people as both Users and Members. See this fig and the one above. It might be useful to standardize.

Manage Learner Groups

Manage Learner Groups, the fifth tab on the left navigation bar, allows you to organize your users into groups to simplify administration of training management. Learner Groups combine learners with similar training needs into groups for training plan and course enrollment assignments.

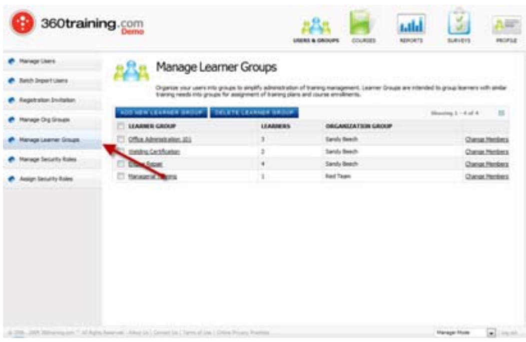


Figure 17: Manage Learner Groups page.

ADD NEW LEARNER GROUPS

New Learner Groups can be added from the Manage Learner Groups page by clicking on the Add New Learner Group button ADD NEW LEARNER GROUP located above the list of Learner Groups. This will take you to the Add Learner Group - Information page. On this page, you will be able to create a new Learner Group by filling in the Learner Group Name box and assign it to an Organiztaion Group. Hit Next NEXT to continue.

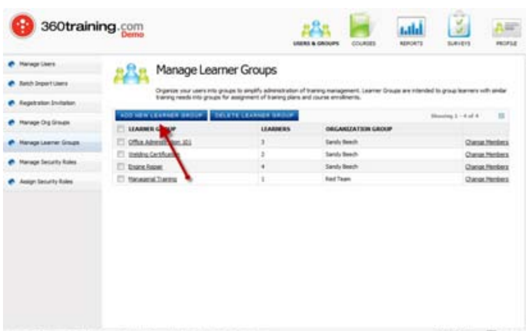


Figure 18: Add Learner Group.

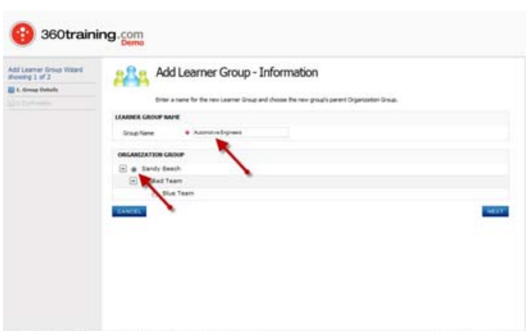


Figure 19: Add Learner Group – Information page with new Learner Group name and Organization Group actions highlighted.

When you have input your new Learner Group, you will be directed to the Add Learner Group – Confirmation page. Here you will be able to review the information you provided. To revise your information, hit Previous; to accept, hit Finish

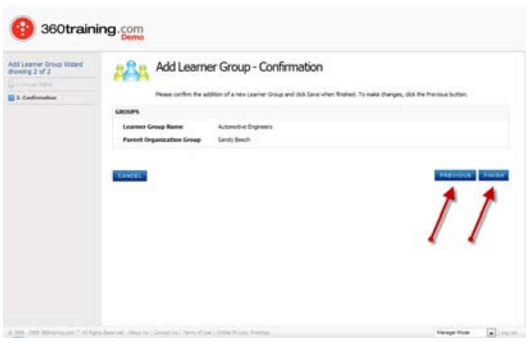


Figure 20: Add Learner Group – Confirmation page.

DELETE LEARNER GROUPS

To delete one or more learner groups, go to the Manage Learner Groups page, select the group(s) to be deleted, and click on the Delete Learner Group button DELETE LEARNER GROUP located above the list of Learner Groups.

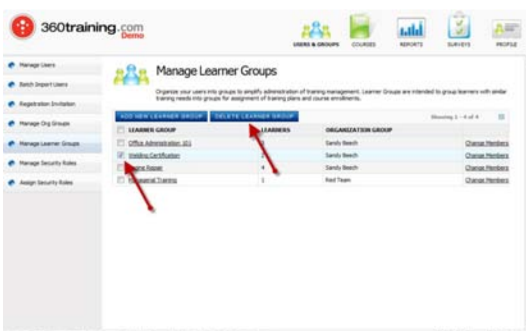


Figure 21: Delete Learner Group.

A confirmation box will then appear asking your permission to delete the item(s). Click OK to confirm and your group(s) will be deleted.

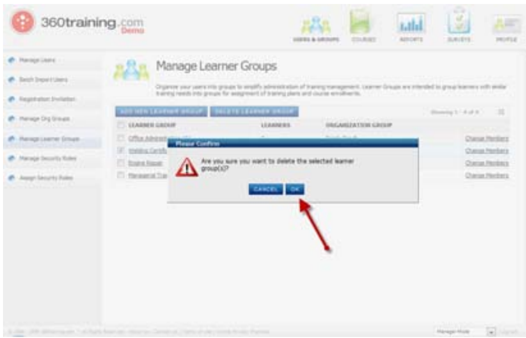


Figure 22: Delete Learner Group confirmation.

CHANGE LEARNER GROUP MEMBERS

Change Learner Group members from the Manage Learner Groups page. Check the group you would like to affect. Then, press the Change Members Change Members click-through.

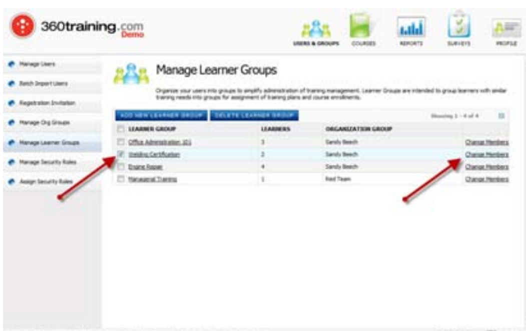


Figure 23: Change Learner Group Members.

The Change Members click-through will take you to the Manage Learner Group Members page. Here, you can add or delete members of the selected Learner Group.

Figure 24: Manage Learner Group Members page.

Add Learner Group Members

Add a Learner Group Member by going to the Manage Learner Groups page, selecting a Group and then pressing the Change Members click-through.

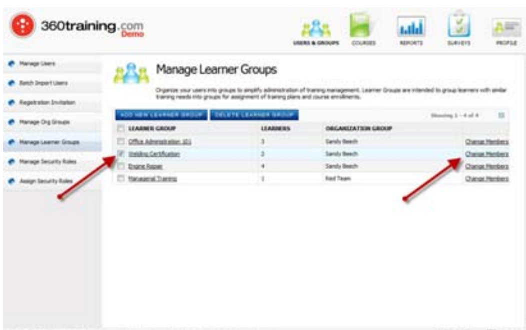


Figure 25: Manage Learner Groups page.

On the Manage Learner Group Members page, click the Add Member button ADD MEMBER .

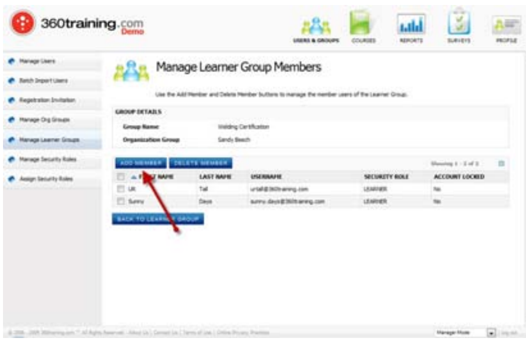


Figure 26: Add Learner Group Member.

This will take you to the Assign Learners to Learner Group page. The page will automatically open to a standard error message, "No records found. Click on the search button to open up the search dialogue." Hit the Search button SEARCH .

Comment [ovhw19]: Might it make sense to open the page to something positive like maybe a note that says something like "Click Search to proceed."?

Also the top of this page says, "To add Users select any user and click next." This is confusing since there are no users shown until after they've done a search. But the page doesn't tell them to search first.

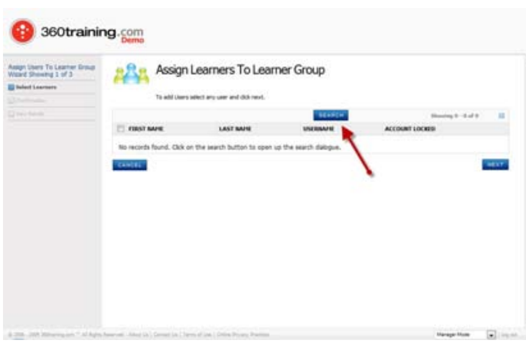


Figure 27: Assign Learners to Learner Group page.

The Search button will activate a search dialog box, where you are able to search by first name, last name and/or email address.

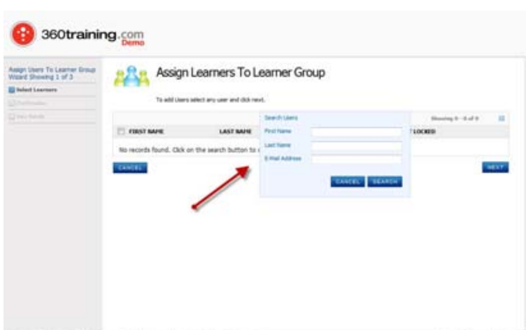


Figure 28: Search for Learners dialog box.

Input your information, press search and a list of learners fitting your criteria appear. Select the user(s) to add and press Next NEXT .

Figure 29: Select Learners to add to Learner Group.

Comment [ovhw20]: Throughout, hitting the back button often screws things up. Down the road, you may want to test it.

To confirm which Learners have been selected, a confirmation page appears.

Comment [ovhw21]: You may want to make this word more prominent on the page. It's easy to miss.

Figure 30: Assign Learners to Learner Group confirmation.

Hit Next NEXT to continue and you will be taken to the final summary page. This page details the number of Learners you attempted to assign to the group and number that were actually assigned. Hit Finish FINISH and you will be taken back to the Manage Learner Groups page.

NOTE: If a Learner is already a group member, the system will not enter a duplicate assignment. If you are not seeing that all of the Learners you attempted were assigned, this is probably the reason.

Figure 31: Assign Learners to Learner Group summary.

Delete Learner Group Members

Delete a Learner Group Member by going to the Manage Learner Groups page, selecting a Group and then pressing the Change Members click-through.

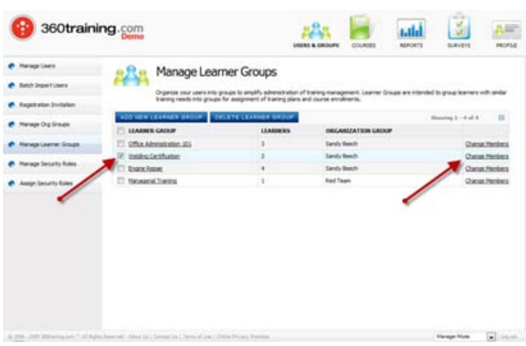


Figure 32: Delete Learner Group Members.

This will take you to the Manage Learner Group Members page, detailing the group name, Organization Group affiliation, and a list of group members. Select the member(s) to be deleted and hit the Delete Member button

Figure 33: Manage Learner Group Members page.

Manage Security Roles

A Security Role configures the features that a user, or group of users, has permission to use. This area allows you to manage system security roles for the users in your organization.

Comment [ovhw22]: correct?

The Manage Security Roles button is the second button from the bottom of the left-side navigation bar. This button allows you to manage the features that a Learner has permission to use. Here, you are able to both Add and Delete roles.

ADD NEW ROLE – LEARNER ROLE TYPE

To add a new Learner role, click the Add New Role button ADD NEW ROLE from the Manage Security Roles page.

Figure 34: Manage Security Roles page; Add New Role.

This will take you to the Add New Security Role page. The page will open in Learner mode.

Figure 35: Add New Security Role page in Learner Mode.

In Learner mode, the Add New Security Role page allows you to input details of whose role is being adjusted in the Details box; and adjust learner permissions. The permissions that can be enabled or disabled are: Reports, Shop Catalog, Profile & Settings. When you have completed the form, hit the Save button 

. This will save your work and you will be returned to the Security Roles page.

ADD NEW ROLE – MANAGER ROLE TYPE

To add a new Manager role, click the Add New Role button 

from the Manage Security Roles page.

Figure 36: Manage Security Roles page; Add New Role.

This will take you to the Add New Role page in Learner Mode, where you will be able to assign a Role Name, and adjust Learner permissions.

Comment [ovhw23]: Someone who knows what these permissions do, may want to supplement this section.

Figure 37: Add New Security Role page in Learner Mode.

To access Manager Mode, click the drop-down box labeled Role Type in the Details box.

Figure 38: Add New Security Role page in Manager Mode.

This page will allow you to enable or disable numerous admin permissions, including:

- Announcements

Comment [ovhw24]: I don't know what these things mean/how they function in your system. Someone else may want to add descriptions.

- Courses
    - Assign training Plans
    - Enroll Learners
    - Manage Courses Manage Training Plans
    - View Entitlements
- Curriculums and Courses
    - Manage Training Plans
    - Manager Courses

Comment [ovhw25]: Should this be "Manage Courses"?

- Manage Surveys
    - Assign Surveys
- Performance Reports
- User Groups & Permissions
    - Assign Security Roles

  - Batch Import Users
  - Manage Learner
  - Manage Learner Groups
  - Manage Organization Groups
  - Manage Security Roles
  - Registration Invitation
- Profile
  - Customer Preferences
  - Customer Profile

When you have completed your assignments, hit the Save button on the bottom right corner of the screen. This will save your work and return you to the Security Roles page.

SEARCH ROLE

To locate a role on the Manage Security Roles/Security Roles page, begin by clicking the Search button . This will take you to the Search security role dialog box.

Figure 39: Search Security Role dialog box.

Enter the name of the role you seek.

NOTE: If you enter only one letter, they system will look up all of the roles that contain that letter. If you enter two letters, the system will look up roles containing those two letters in that exact sequence, etc.

DELETE ROLE

To delete a role from the Manage Security Roles/Security Roles page, by Searching for the role(s) you want to delete. Once the role(s) appears, click the role(s) to be deleted and hit the Delete Role button .

Figure 40: Delete roles.

A box will appear asking for you to confirm the transaction.

Figure 41: Delete Role confirmation dialog box.

Comment [ovhw26]: There is a typo in this screen. It should read, "Are you sure you WANT to..."

If you have failed to select a role before hitting Delete Role DELETE ROLE, you will receive an error dialog box.

Figure 42: Failure to select Role dialog box.

Comment [ovhw27]: This also has a typo. It should read, "...FROM the list." From is transposed and list does not need to be capitalized.

VIEW AND ADJUST ROLES AND THEIR MEMBERS

To see a list of all of your roles. Begin at the Manage Security Roles main page. Hit the Search button SEARCH. This will open the Search dialog box. Do not put anything into the "Security Role Name" field. Hit Search SEARCH.

Comment [ovhw28]: It might be good to have a more intuitive way to do this.

A page containing all of your roles will appear. The list will begin with "LEARNER" and "MANAGER" roles. These roles cannot be deleted. But their members can be viewed and adjusted by hitting the Change Members Change Members button on the right.

All of the other roles on the list will be underlined. These roles can be managed or deleted. To review or adjust the role, click on the underlined role name. Role members can be viewed or adjusted by clicking the Change Members button Change Members on the right.

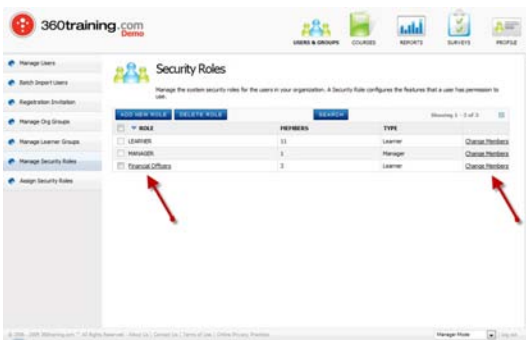


Figure 43: List of all Security Roles.

Assign Security Roles

Assign Security Roles is the bottom button on the left navigation bar. To assign security roles, select the role group that you would like to assign and press Next NEXT.

Figure 44: Assign Security Roles page.

This will take you to the Select Learners page. Here, click Search SEARCH to find the member(s) you would like to assign.

Comment [ovhw29]: The error message on these search pages is a bit confusing. Can it be removed at least on the initial page view?

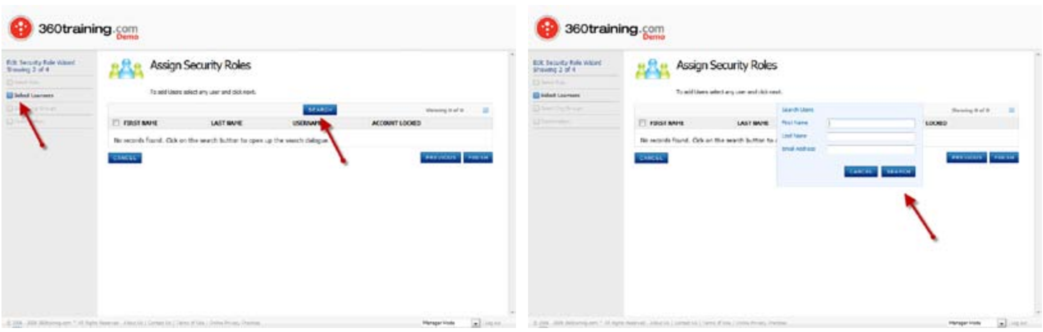


Figure 45: Assign Security Roles – search for learners.

The Search dialog box allows you to find the learners you would like to assign roles.

NOTE: The fields do not have to be filled completely. For example, using only the first few letters of a name will provide a list of all learners whose names contain that letter sequence; such that, entering "in" would render such names as ***In***grid and Marv***in***.

This action will bring up a list of names that fit your parameters. Here, select the learners to be assigned that role and press Finish.

Figure 46: Assign Security Roles – select/assign learners.

Upon selecting and assigning security roles to learners, a confirmation screen will appear. It will present a summary of the number of users assigned and the role to which they were assigned. Below the Summary Information. Is a list of each member who has been assigned. To confirm that the information is correct and save it to the system, hit Save on the bottom right of the screen. If the information is correct, hit the back button and you will be returned to step 1 of assigning security roles.

Comment [ovhw30]: If I were a user, I'd prefer to be taken back one page where I have already searched the names. Then, if it was the role that was the problem, all I'd have to do is hit Previous.

Better, why not have buttons on the page saying something like "Change Role" and "Change Learner(s)"

Courses

The Courses area of the site allows you to manage the courses that are available to your organization. Here you will be able to:
View Contracts
Enroll Learners
Manage Courses
Manage Training Plans
Assign Training Plans

To reach the Courses area from the Home Page (Manage Users), click the green Courses icon at the top of the screen.

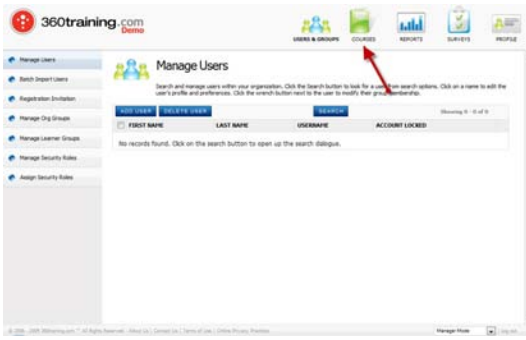


Figure 47: Home Page – Courses Icon.

View Contracts

The Courses icon opens to the View Contracts page. To reach View Contracts from any of the Courses areas, click the top navigation bar on the left. Contracts list all courses accessible to your organization. View Contracts detail includes:
Contract Name
Contract Type
Seats Ordered
Seats Used
Seats Remaining
Expiration Date

Figure 48: View Contracts page.

Click on the contracts's name to see more information about a contract.

Figure 49: View Contracts – click through for contract detail.

This will take you to the View Contracts – Edit Summary page.

Figure 50: View Contracts – Edit Summary page.

On the View Contracts – Edit Summary page, you can view and adust the following:
Contract Information
Contract Name
Maximum Enrollments
Allow Self Enrollment
Contract Type
Start Date
Terms of Service
Seats Used
Seats Remaining
Organization Groups
Maximum Enrollments

When you have finished your adjustments, scroll down and hit Save in the bottom right corner of your screen. This will save your edits and return you to the main View Contracts page.

Figure 51: Save Edit Summary adjustments.

Enroll Learners

Reach the Enroll Learners area by clicking the Courses Icon at the top of the page followed by the Enroll Learners tab on the left navigation bar.

Figure 52: Enroll Learners location.

Select Enrollment Method

At the Enroll Learners page, first select the enrollment method by activating the desired radio button and pressing Next NEXT.

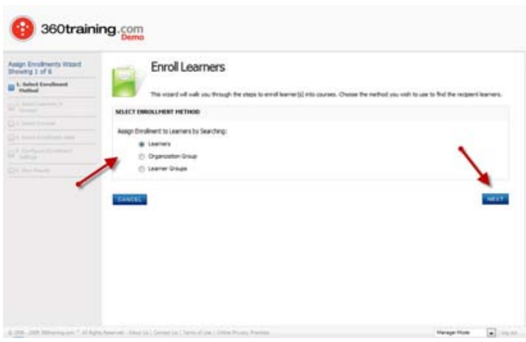


Figure 53: Enroll Learners – Select Enrollment Method.

Select Learners or Groups

This will take you to an unpopulated search results screen. Press Search  to locate the Learner, Learner Group or Organization Group you would like to enroll.

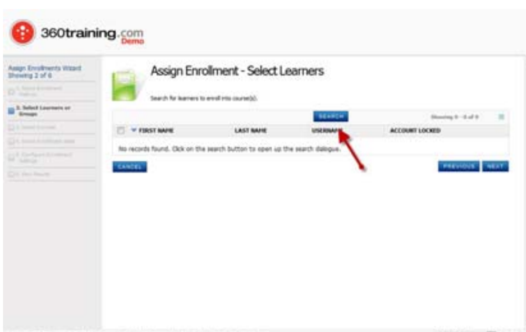


Figure 54: Search for enrollees.

The Search button will activate the search dialog box.

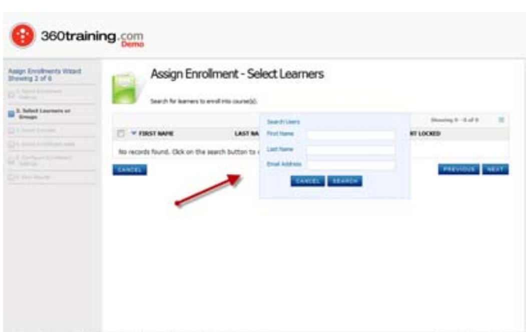


Figure 55: Assign Enrollment – Select Learners search dialog box.

The Search dialog box allows you to find the learners or organizations you would like to enroll in course(s).

Comment [ovhw31]: It should be "enroll in" not "enroll into."

NOTE: The fields do not have to be filled completely. For example, using only the first few letters of a name will provide a list of all learners whose names contain that letter sequence; such that, entering "in" would render such names as ***In***grid and Marv***in***.

This action will bring up a list of names that fit your parameters. Here, select the learners or groups to be enrolled and press Next 

.

Figure 56: Assign Enrollment – Select Learners.

Select the learner(s) or group(s) and hit next.

Select Courses

On the Assign Enrollment- Search Courses page, hit the search button to activate the search dialog box.

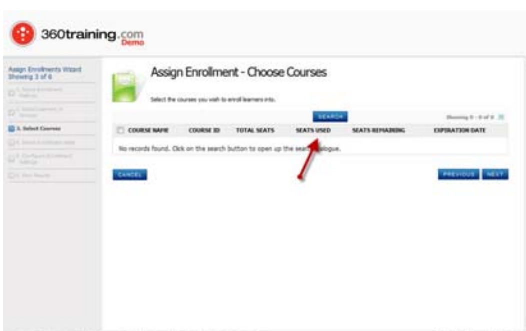


Figure 57: Assign Enrollment – search button.

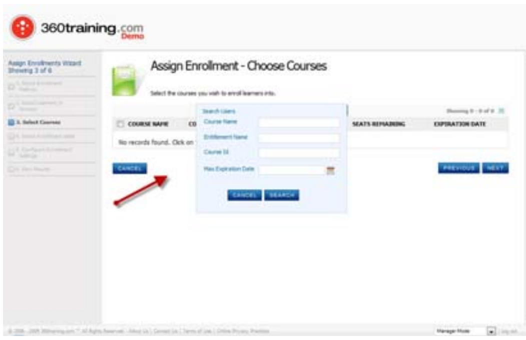


Figure 58: Assign Enrollment – Choose Courses search dialog box.

The Search dialog box allows you to find the learners or organizations you would like to enroll in course(s).

Search input will bring up a list of names that fit your parameters. Here, select the learners or groups to be enrolled and press Next NEXT.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "ic" would render names such as Techn***ic***al Education and Med***ic***al Procedures.

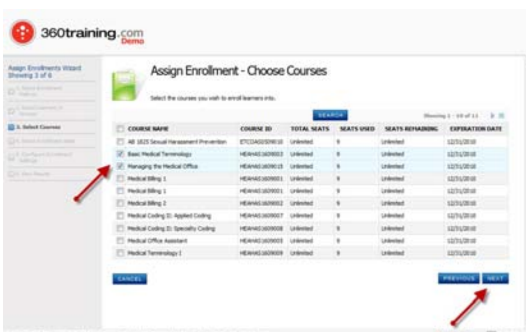


Figure 59: Assign Enrollment – Choose Courses.

Select Enrollment Dates

Once you have chosen courses, you will be able to input the duration of each enrollment. Learners will have access to the courses for the days you enter. You can assign the same duration to all of the courses you have specified, or assign individual durations for each class. All durations must have a beginning and end date. After assigning the duration(s), hit Next NEXT to proceed.

Comment [ovhw32]: It should be "enroll in" not "enroll into."

Comment [ovhw33]: Somewhere else, I thought I saw a course that was set for "ongoing" or something like that. Is that possible to set here? If so, please insert the info.

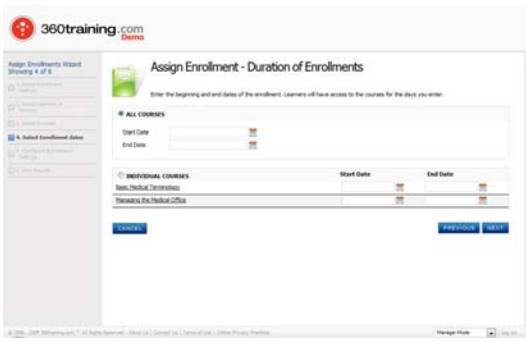


Figure 60: Assign Enrollment – Duration of Enrollments.

Configure Enrollment Settings

Following enrollment duration assignments, the system will ask you to select options for this course enrollment. You will tell the system whether to update or ignore duplicates, send you a confirmation or send your learner(s) a confirmation. Duplicate enrollments will be either updated to the new enrollment in this training plan or ignored per your selection. Make your selections and press Finish FINISH.

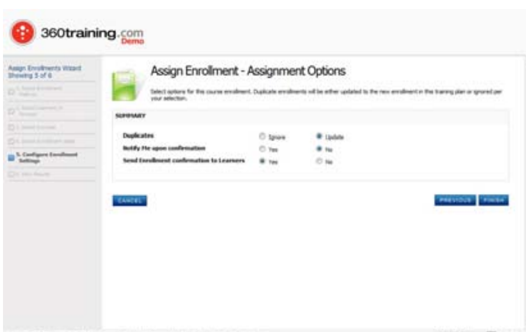


Figure 61: Assign Enrollment – Assignment Options.

Assign Enrollment – Results

When you have completed the process, the Assign Enrollment – Results page will show a summary of the course contracts used in the bulk enrollment process. It details the number of learners attempted to enroll and the number of courses assigned.

Hit OK OK and you will be returned to the main Enroll Learners page.

Figure 62: Assign Enrollment – Results.

Manage Courses

To locate Manage Courses, click the Courses Icon on the top of the screen followed by the Manage Courses tab on the left navigation bar.

Figure 63: Manage Courses – location.

The Manage Courses main page allows you to add custom courses, delete custom courses or search courses and course groups.

Add Custom Courses

From the Manage Courses main page, press the Add Custom Course button.

Figure 64: Add Custom Course button.

This will take you to the Add Custom Course page. Fill out the form to create a custom course. The form will ask for the following course information: Course Name, Credit Hours, Link and Description.

When users launch the custom course from the LMS, an Internet browser will open to the link provided for the custom course.

Comment [ovhw34]: There are two periods at the end of this sentence on the Add Custom Course page. Also, Internet should be capitalized.

Figure 65: Add Custom Course page.

When you have completed the form, hit Finish FINISH. This will return you to the Manage Courses main page where you can Search SEARCH for your course to confirm that it has been entered into the system.

Comment [ovhw35]: Might be nice to have a confirmation page instead.

Search for Courses

On the main Manage Courses page, there are two ways to locate courses.

Click the Show All Icon on the right of the screen.
Press the Search button SEARCH. This will engage the search dialog box. Enter some of all of the course(s) you wish to locate.

Comment [ovhw36]: This location isn't very crowded so this icon could benefit from being enlarged and/or changed to a button that says "Show All." This button is easy to miss and not a very intuitive design.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "ic" would render names such as Techn***ic***al Education and Med***ic***al Procedures.

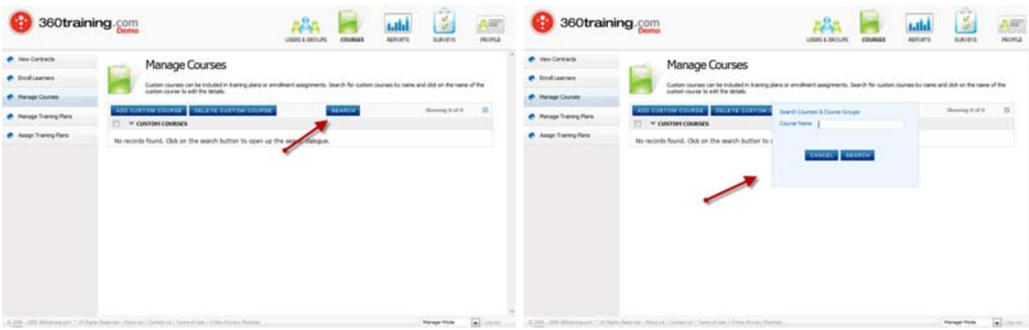
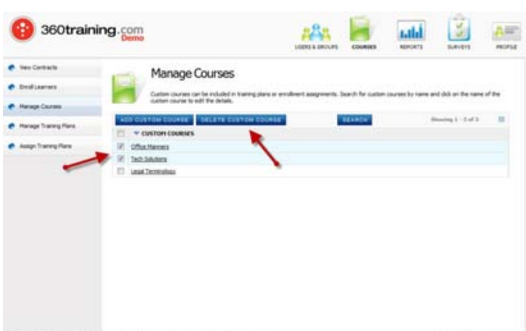


Figure 66: Manage Courses – Search to find specific course(s) to delete.

Figure 67: Manage Courses – Show All.

Delete Custom Courses

From the Manage Courses page, search for the course(s) you would like to delete. Select the course(s) that you would like to delete and hit the Delete Custom Course button DELETE CUSTOM COURSE .



Manage Courses – Delete Custom Course.

You will receive a confirmation alert. Click OK and your deletion will be registered.

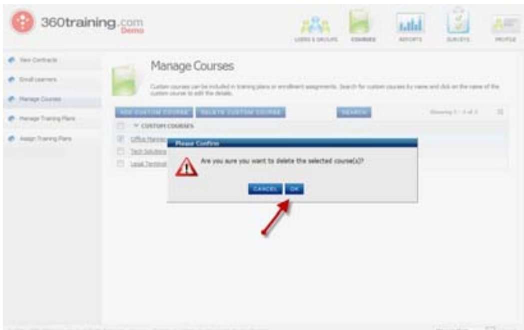


Figure 68: Manage Courses – delete course alert.

Summary Information will be provided detailing the number of courses you attempted to delete, number of courses that were successfully deleted and the number of courses not deleted. The summary also includes detail of the course(s) deleted, including S. number, course name, status and comments. Click OK and you will be returned to the Manage Courses main page.

Comment [ovhw37]: Should this be course number?

Figure 69: Manage Courses – Delete Custom Courses Summary.

Manage Training Plans

Training plans are packages of courses that can be easily assigned to learners. To reach the Manage Training Plans area, click on the Courses icon at the top of the screen, followed by the Manage Training Plans button on the left navigation bar.

Figure 70: Manage Training Plans – location.

Add a Training Plan

On the Manage Training Plans main page, click on the Add Training Plan button  .

Figure 71: Manage Training Plans – Add Training Plan.

Comment [ovhw38]: The show all button on this page doesn't seem to work.

PROVIDE TRAINING PLAN NAME AND DESCRIPTION

On the Add Training Plan – Information page, input the name and, optionally, a description of the new training plan.

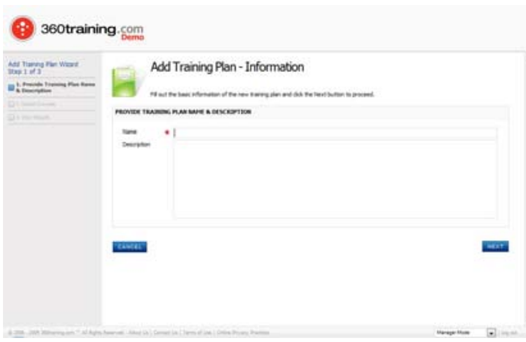


Figure 72: Add Training Plan - Information.

SELECT COURSES

Search for the courses you would like to assign to the training plan. There are two ways to do this:

- Show all available courses using the Show All .button on the right of the screen.
- Hit the Search button and search using the dialog box. Search input will bring up a list of names that fit your specific parameters. Here, select the learners or groups to be enrolled and press Next .

Comment [ovhw39]: Again, you might reconsider this icon. This is actual size.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering “ic” would render names such as Techn***ic***al Education and Med***ic***al Procedures.

Figure 73: Manage Training Plans – Show All button.

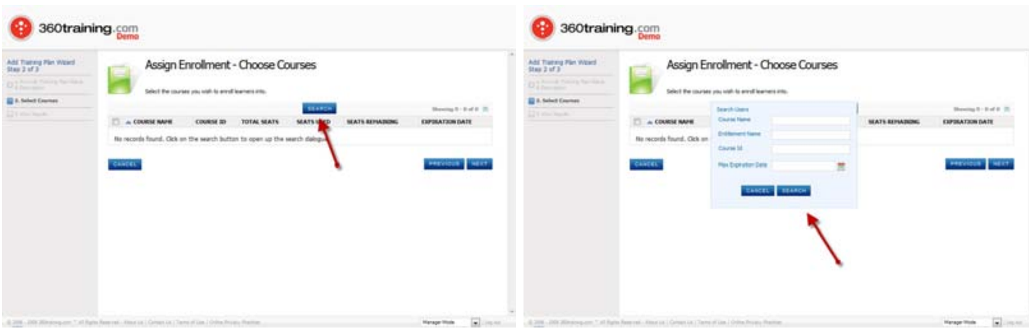


Figure 74: Search for courses to add to training plan.

Select the courses you would like to assign to the training plan and hit Next NEXT.

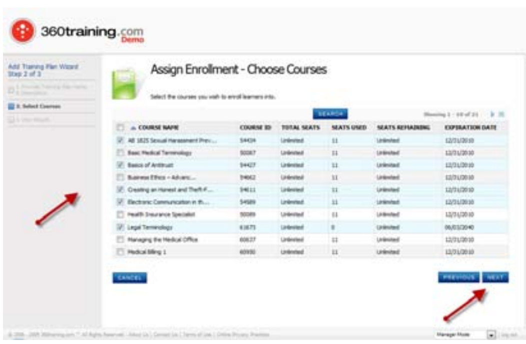


Figure 75: Manage Training Plans – Choose Courses.

Comment [ovhw40]: You may want to take a look at the heading and descriptive text. It doesn't seem to correspond to the section. Also, the grammar is a bit dicey.

How about something like...

Select the courses you would like to assign to this training plan.

VIEW RESULTS

Review your Assignment Results to confirm that the correct courses have been assigned to your training plan and hit Finish FINISH.

Figure 76: Add Training Plan – Assignment Results.

Search for Training Plans

Search for a training plan to review it or change the plan's name and/or description. Do this by either hitting the Show All button or by using the Search button to find a specific plan.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "ic" would render names such as Techn***ic***al Education and Med***ic***al Procedures.

Figure 77: Manage Training Plans – Show All button.

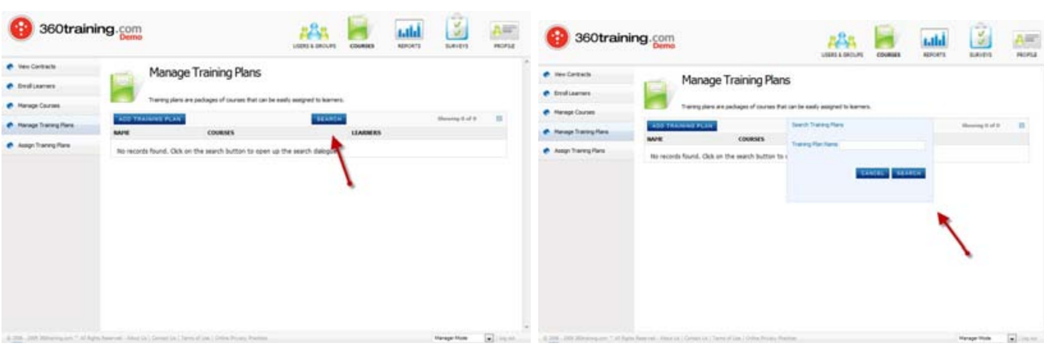


Figure 78: Manage Training Plans – search for specific plan.

Delete Training Plans

On the main Manage Training Plans window, click on the

Comment [ovhw41]: There isn't a Delete Training Plans button and no way to delete a plan via the other dialogs.

Assign Training Plans

Assign Training Plans allows you to select the user(s) or group(s) to be assigned a specific training plan.

Locate the Assign Training Plans area by clicking on the Courses icon at the top of the screen, followed by clicking the Assign Training Plans bar on the left navigation panel. This will take you directly to the Select Training Plan screen.

Figure 79: Assign Training Plans location.

Select Training Plan

The Select Training Plan screen is activated when you press the Assign Training Plans tab on the left navigation bar. The list contains all of the Training Plans available. Select the plan or plans you wish to assign and click Next .

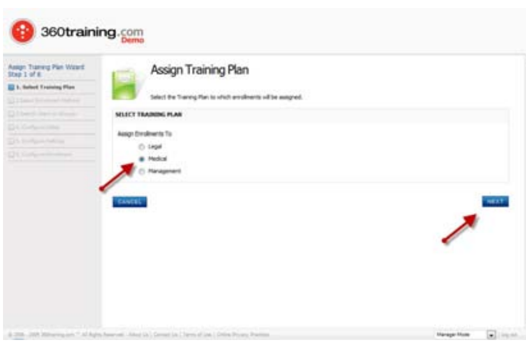


Figure 80: Assign Training Plan – Select Training Plan.

Select Enrollment Method

Choose the Group Category you would like to assign a training plan and hit Next .

Comment [ovhw42]: “Method” seems a bit confusing. Do you think “Category” or something like that might be a better choice?

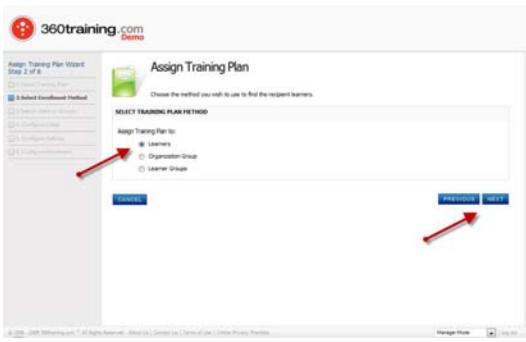


Figure 81: Select Enrollment Method.

Search Users or Groups

There are two ways to locate users or groups: 1) Use the Search button and search dialog box or 2) click the Show All button on the upper right.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "in" would render names such as ***In***grid or Marv***in***.

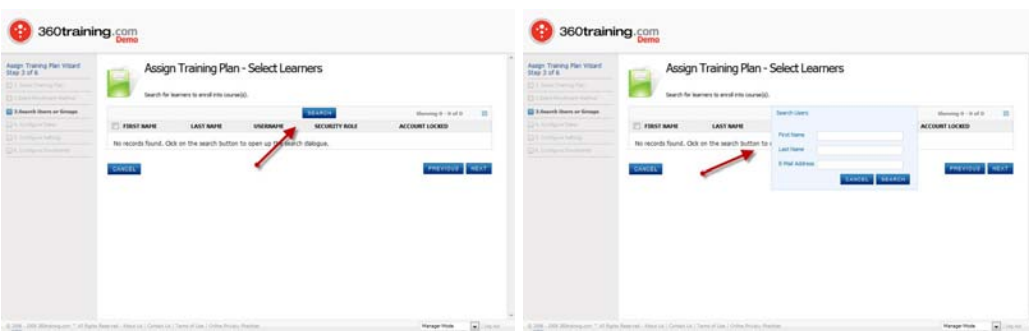


Figure 82: Assign Training Plan – Select Learners; Search.

Comment [ovhw43]: Do you think it would make sense to have these pages open to the Show All list and then provide a way to narrow the list or Search from there? It seems that it would cut a few keystrokes and a bit of annoyance and confusion.

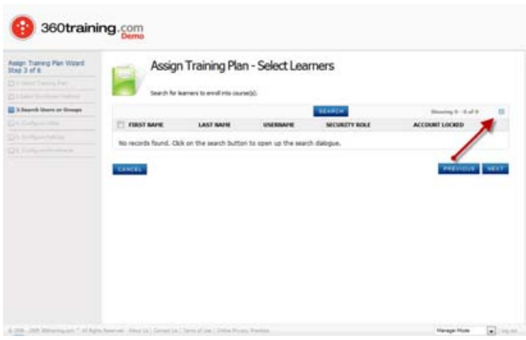


Figure 83: Assign Training Plan – Select Learners; Show All.

When you have called up the learner(s) or group(s) you would like to assign, make your selections and press Next NEXT.

Figure 84: Assign Training Plan – Select Learners; choose learners.

Configure Dates

Enter the start date and end date of this training plan assignment. Dates must be entered in the following format mo/day/year – xx/xx/xxxx. Begin entering a date and a calendar drop-down will be activated; or you can activate the calendar drop down by clicking the calendar icon to the right of the date box.

Figure 85: Assign Training Plan – Duration.

Configure Settings

Select options for this Training Plan assignment. Determine whether:
Duplicates will be updated to the new enrollment in this training plan or ignored.
You will be notified upon certification.
An enrollment confirmation will be sent to Learners.
When you have set your options, hit Finish FINISH .

Figure 86: Assign Training Plan – Options.

View Results

The Assign Training Plan – Results page, reports the number of learners you attempted to enroll and the number of courses assigned.

The screen also reports that the enrollment process has been started. This may take 10-15 minutes to complete depending upon how many students you are enrolling. An email confirmation will be sent to your email address once the process has been completed.

When you have completed your review, press OK to return to the Manage Training Plans main page.

Comment [ovhw44]: It reports those attempted but no those completed. Learners assigned might be a useful confirmation. Or is that not possible because of the 10-15 min delay?

Comment [ovhw45]: Should this be the Assign Training Plans screen?

Figure 87: Assign Training Plan – Results.

Reports

Reports allows you to run and customize an array of reports to better manage your LMS activities.

Reports – Navigation

The section's main navigation Report List is located on the left of the screen. Click an area on the navigation bar to expand it for more options. If you would like to minimize the entire Report List bar, click on the small tab to the right of the navigation area.

Figure 88: Reports – Report List navigation.

Report Summary

Access Reports

Access Reports by clicking the Reports icon  in the top navigation area. The area will open to the main Summary Page.

Comment [ovhw46]: correct?

Comment [ovhw47]: As a user, I would be more comfortable having this navigation area at the top of every page. That way, if I change my mind or realize that I need to do a different process first, I won't have to hunt around for the best way to get where I want to go.

Figure 89: Report Summary page. Summary tab, Reports icon.

Here, you will be able to examine reports in the following categories:

- Performance
- Utilization
- Survey
- Registration

You are also able to save reports that you review frequently in Favorites.

View Reports

To view reports select the report type on the left navigation bar. Then, choose the specific report from the drop-down box.

Comment [ovhw48]: Screen instructions for this area say: "Click on the Run Report Now button to run this report." But, the button says "Execute Now".

Figure 90: Reports - select and execute report.

To view report results, on the site in HTML, click on the blue HTML icon . To download the report in Excel format, click the green Excel icon , save the zip file and then open the Zip File.

Comment [ovhw49]: Download misspelled on site.

Figure 91: Report Summary – View Results.

Comment [ovhw50]: Icons to the left of each report type are the same as the Show All icons elsewhere. This might be confusing.

Reports Available

PERFORMANCE REPORTS

Performance reports include:

- Content Performance by Course
- Content Performance by Course Group
- Content Performance by Training Plan
- Content Performance Summary (All Course Groups)
- Content Performance Summary (All Training Plans)
- Learner Group Performance by Course
- Learner Group Performance by Course Group
- Learner Group Performance by Training Plan
- Learner Group Performance Summary (All Course Groups)
- Learner Group Performance Summary (All Courses)
- Learner Group Performance Summary (All Training Plan)
- Learner Performance by Course
- Learner Performance by Course
- Learner Performance by Course
- Learner Performance by Course Group
- Learner Performance by Training Plan
- Learner Performance Summary (All Course Groups)
- Learner Performance Summary (All Courses)
- Learner Performance Summary (All Training Plans)
- Organization Group Performance by Course
- Organization Group Performance by Course Group
- Organization Group Performance by Training Plan

Comment [ovhw51]: Should these have more detail?

- Organization Group Performance Summary (All Course Groups)
- Organization Group Performance Summary (All Courses)
- Organization Group Performance Summary (All Training Plan)

UTILIZATION REPORTS

Utilization reports include:

- Content Utilization by Course
- Content Utilization by Course Group
- Content Utilization Summary (All Course Groups)
- Content Utilization Summary (All Courses)
- Customer Entitlements
- Learner Group Performance by Training Plan
- Learner Utilization by Course
- Learner Utilization Summary (All Course Groups)
- Learner Utilization Summary (All Courses)
- Organization Group Utilization by Course
- Organization Group Utilization by Course Group

SURVEY REPORTS

Survey reports include:
Customer Entitlement By Survey
Learner Group Utilization by Survey
Learner Group Utilization Summary (All Survey)
Learner Utilization by Survey
Learner Utilization Summary (All Survey)
Organization Group Utilization by Survey
Organization Group Utilization Summary (All Surveys)

REGISTRATION REPORTS

Registration reports include:
Learner Registration by Learner
Learner Registration by Learner Group
Learner Registration by Organization Group
Learner Registration Summary (All Learner Groups)
Learner Registration Summary (All Learners)
Learner Registration Summary (All Organization Groups)

Favorites

ADD FAVORITES

To add a report to your Favorites, select the report you would like to save, then click the Add To Favorites gray star icon on the upper right of the main Reports screen. When the report has been accepted as a Favorite it will turn from gray to yellow .

Comment [ovhw52]: It seems that it would be useful to have "Favorites" written below the star.

Figure 92: Reports – Add Favorites.

REMOVE FAVORITES

To remove reports from your Favorites list, click the report to be removed located in the Favorites section of the left navigation bar; then, click the yellow favorites star icon on the right of the screen. When the report has been removed as a Favorite the icon will turn gray .

Comment [ovhw53]: star icons are different sizes on screen, yellow is smaller.

Figure 93: Reports – remove Favorites.

RUN FAVORITES

Comment [ovhw54]: Survey reports and possibly others don't have an active Favorites star icon.

Run A Favorite

To run a single Favorite report, open the Favorites area on the left navigation bar, click on the desired report, then click Execute Report EXECUTE REPORT . To view report results, on the site in HTML, click on the blue HTML icon HTML . To download the report in Excel format, click the green Excel icon EXCEL , save the zip file and then open the Zip File.

Comment [ovhw55]: Download misspelled on site.

Run All Favorites

To run all of the Favorites in your system, open the Favorites area on the left navigation bar and press the Run All Favorites button RUN ALL FAVORITES .

Comment [ovhw56]: I can't tell how this works. It seems to only run the highlighted report (like running a single favorite).

Edit / Create Reports

To edit or create a new report, click the Edit button, input your changes and then hit Save As New Report.

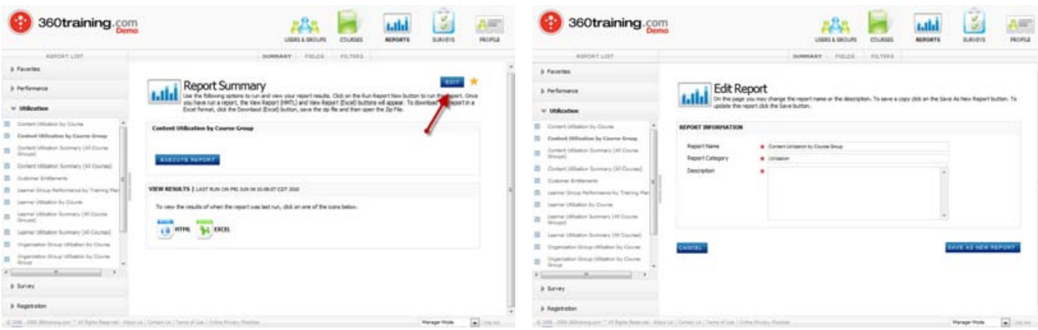


Figure 94: Edit / Create Reports. Edit Button, Edit Report screen.

Report Fields

Report Fields can be accessed by pressing the Reports icon 

on the top right navigation bar, followed by the Fields tab located near the top of the Reports page.

Figure 95: Locate Reports Fields.

The Report Fields area provides options to customize your report.

- **Report Fields** allows the customization of fields displayed on the report.
- **Report Field Ordering** allows customization of the field/column order on the report.
- **Report Field Sorting** allows customization of sorting the data on the report. Note Changes made from this page will not appear on this report until the next time it is run.

Comment [ovhw57]: note two are "Report Field" while one is Report Fields. This area might enjoy a bit of tweaking for consistency. Also "Report Fields" is already the name of the section. Do you think it would be useful to call it "Report Field Customization" or something like that?

Figure 96: Report Fields options: customization, ordering, sorting.

Select Report

To manage report fields, first select the report type to be addressed on the left navigation bar.

Figure 97: Begin addressing Report fields by selecting report type.

Report Fields Customization

This option allows you to select your preferred fields for a report from a predefined list. To enable a field, click on the check box next to the field name. If you would like to select all available report fields, click the box to the left of the table heading "Fields." If you would like to unselect all, click the box again. When complete, click the Save button SAVE.

Comment [ovhw58]: There is no save button. But I included the icon in the text because it's easier to remove than add.

Also, I was unable to detail what happens after the Save button is hit.

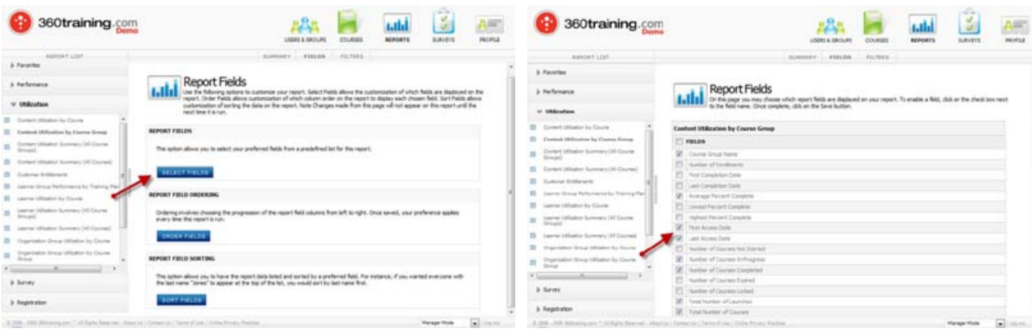


Figure 98: Report Field customization.

Report Field Ordering

Ordering involves choosing the progression of the report field columns from left to right. To change the order click on the up arrow or down arrow next to the field name. Once complete, click on the Save button SAVE. Once saved, your preference applies every time this report is run.

Comment [ovhw59]: There is no save button. But I included the icon in the text because it's easier to remove than add.

Also, I was unable to detail what happens after the Save button is hit.

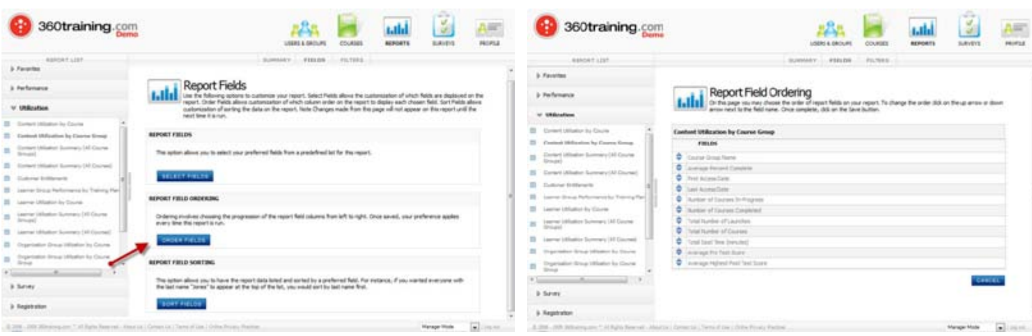


Figure 99: Report Field Ordering.

Report Field Sorting

This option allows you to have the report data listed and sorted by a preferred field. For instance, if you wanted everyone with the last name "Jones" to appear at the top of the list, you would sort by last name first. On this page you can sort the fields on your report. To change the sort type click on the single arrow on the far left of the field name. As with the Report Field Ordering option, to sort by field click the up-down arrows just to the left of the field. Once complete, click on the Save button SAVE.

Comment [ovhw60]: may = permission; can = ability.

Comment [ovhw61]: There is no save button. But I included the icon in the text because it's easier to remove than add.

Also, I was unable to detail what happens after the Save button is hit.

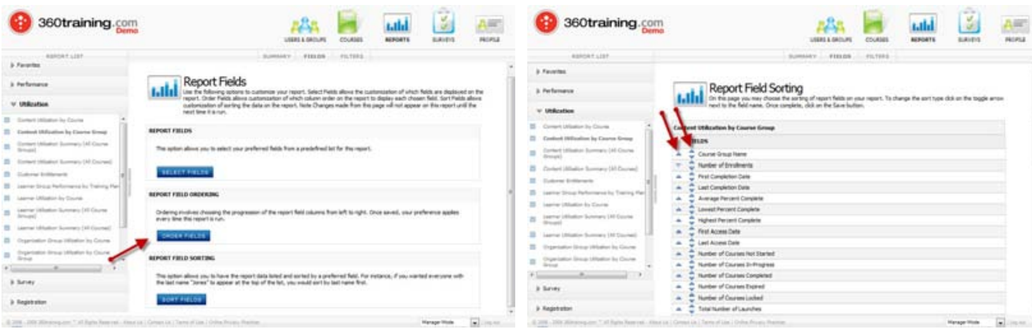


Figure 100: Report Field Sorting.

Report Filters

On this page you can create filters for this report. To add a new filter, click on the Add Filter Button. To remove a filter click on the Remove Filter Button.

Comment [ovhw62]: can not may

Comment [ovhw63]: No buttons so I couldn't examine.

The graphic will need to be changed to address buttons.

Figure 101: Report Filters.

Surveys

View and revise a complete list of surveys managed by your organization. Manage survey questions, as well as which courses are attached to a specific survey. You can also view survey responses.

Surveys – Navigation

To reach the Suveys area, click on the Survey's icon 

on the upper right of the screen.

This will take you to the Manage Surveys main page. On this screen are buttons to add a survey 

, retire a survey 

, and search 

.

On the left of the Surveys screen is a navgation bar that links to:
Manage Surveys
Assign Surveys
Announcements

Figure 102: Surveys navigation.

Comment [ovhw64]: It would be nice if this page had a "Show All" option.

Again, it would be useful if the pages with "Show All" options opened to that as the default. Then, if the list is long, they could search for the specific one(s). If the list is short, you've saved them confusion and a few keystrokes.

Manage Surveys

The Manage Surveys page allows you to view a complete list of the surveys managed by your organization. You can manage the courses associated with each survey, survey response metrics, and preview the survey.

Search for Surveys

To manage existing surveys, first search for the survey you would like to manage. On the main Surveys – Manage Surveys page, press Search 

. This will activate a search dialog box.

The search dialog box allows you to conduct a refined search by name, status (all, published, unpublished), and whether or not you want to retire the survey.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "in" would render names such as ***In***ternational Business or Modern Medic***in***e.

Complete the form and press Search 

.

Figure 103: Search for Surveys.

The search will reveal all of the surveys that fit your parameters. If you prefer to see all of the surveys available to your organization, press the Show All icon on the right of the table heading.
From this page, you are able to view the survey name and status and access links that:
Show Courses associated with each survey.
Analyze survey metrics.
Preview the survey.

Show Courses

When you have located the survey(s) you would like to manage, click the Show Courses link Show Courses to the right of the survey you would like to review.

Figure 104: Show Courses link.

This will take you to the Manage Survey – Edit Courses screen, where you can search for and assign courses.

Figure 105: Search for Courses.

Comment [ovhw65]: This seems to be missing the Search button. So, I wasn't able to go deeper with this action.

Analyze Survey Metrics

Analyze survey metrics by clicking the Analyze link Analyze to the right of the survey you would like to review.

Figure 106: Analyze link.

This will take you to the Response Summary page.

RESPONSE SUMMARY

This survey analysis report collects all responses and gives you an overall picture of survey and question metrics. The data includes:

- Survey Information
  - Total Started Survey
  - Total Completed Survey
- Question Information
  - Skipped Question
  - Answered Question
  - Response Percentage
  - Response Count

When you have concluded your review, hit Close CLOSE at the bottom right of the screen.

Figure 107: Analyze Survey – Response Summary.

Comment [ovhw66]: This table is a bit confusing. Might be better if all topics are top, info below or something like that. Rather than having some top and some left.

Survey Preview

After you have located a survey from the Surveys main page, click the Preview link Preview to the right of the Summary name.

Figure 108: Preview Surveys link.

The next page presents a preview of the survey. All survey questions and their possible responses are listed.

NOTE: Any responses entered on this preview will not be saved.

Figure 109: Survey preview.

Add Surveys

To add a survey, on the Manage Surveys main page click the Add Survey button ADD SURVEY.
Survey Information
The Add Survey button ADD SURVEY takes you to the Survey Information page, where you can input the topline details of your survey, including:

- Survey Name
- Status
- Event (When the survey will be disseminated.)
- Questions Per Page

When you have completed the form, hit Next NEXT.

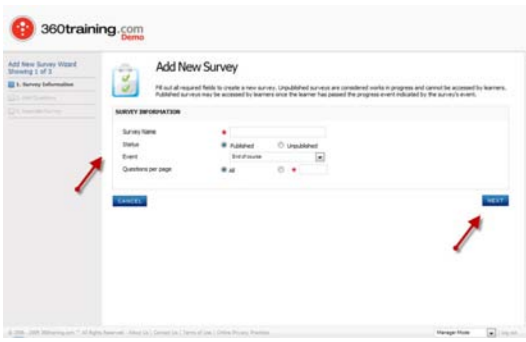


Figure 110: Add Questions.

ADD SURVEY QUESTIONS

After adding Survey Information, you are directed to the Add Questions page. Press Add Question ADD QUESTION and a dialog box appears. This box allows you to create a question, including form (multiple choice, etc.), content, acceptable answers and whether this question must be answered.

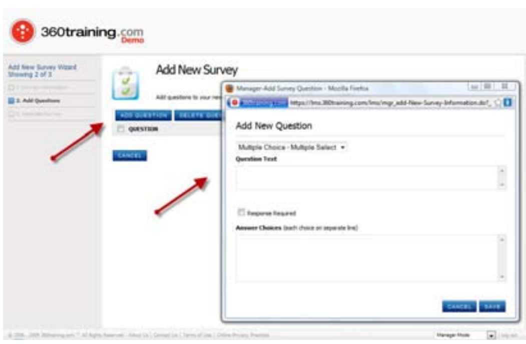


Figure 111: Add survey questions.

When you have completed each question, they system returns to the main Add Questions page. After you have completed your list of questions, hit Next NEXT.

DELETE SURVEY QUESTIONS

Survey questions can be deleted from the Add New Survey page. To delete a question, highlight the question and press Delete Question DELETE QUESTION.

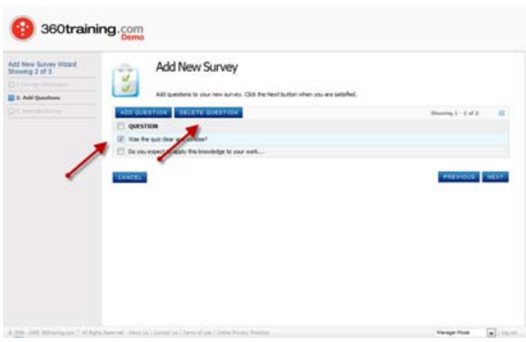


Figure 112: Delete Survey Question.

This will activate a screen confirming that your intent is to delete the question. Press OK and you will be returned to the Add New Question page to Add or Delete additional questions.

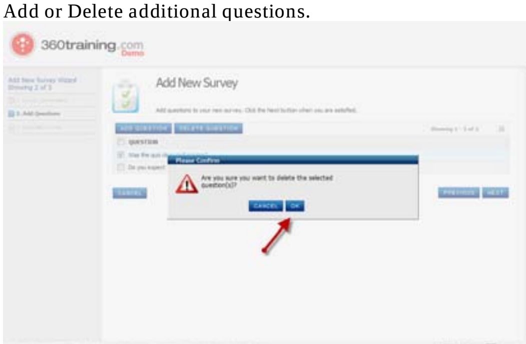


Figure 113: Surveys – Delete Question Confirmation.

When you have finished building the questionnaire, hit the Next button . on the bottom right of the screen. This will return you to the final Add New Survey / Associate Survey screen.

Comment [ovhw67]: On the left, this screen says Associate Survey. On the top it says Add New Survey. It might be useful to have Associate Survey more prominently displayed on the page.

ASSOCIATE SURVEYS WITH COURSE(S)

The final stage of Adding a Survey is to Associate the survey with one or more courses.

Search for Courses to Associate

On the Associate Survey page, Search for the course(s) you would like to associate. To do this, press the Search button and input your criteria.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "in" would render names such as ***In***ternational Business or Modern Medic***in***e.

Figure 114: Search for courses to associate.

A search dialog box will be activated. It will ask for the survey name, status (all, published, unpublished), and whether or not you would like to retire the survey.

Once you have located the course(s) you would like to associate with the survey, select the course(s) and press Finish FINISH .

Associate Surveys

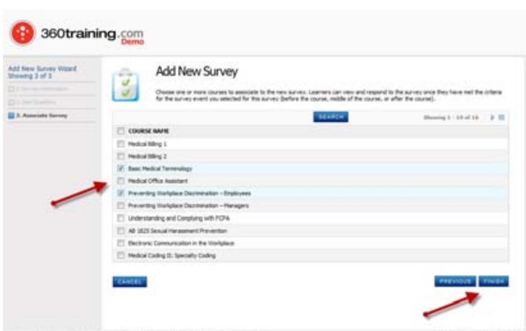


Figure 115: Associate surveys with courses.

Retire Surveys

To retire a survey, click the Surveys icon SURVEYS at the upper right of the screen. This will take you to the Manage Surveys main page. Here, click the Search button SEARCH . and locate the survey you wish to remove.

Figure 116: Retire Surveys – location.

Comment [ovhw68]: This page could really benefit from a Search All option. If you can't remember the name of the survey you're SOL.

SEARCH FOR SURVEYS TO RETIRE

On the Associate Survey page, Search SEARCH for the course(s) you would like to associate. To do this, press the Search button SEARCH and input your criteria.

NOTE: Search fields do not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "in" would render names such as ***In***ternational Business or Modern Medic***in***e.

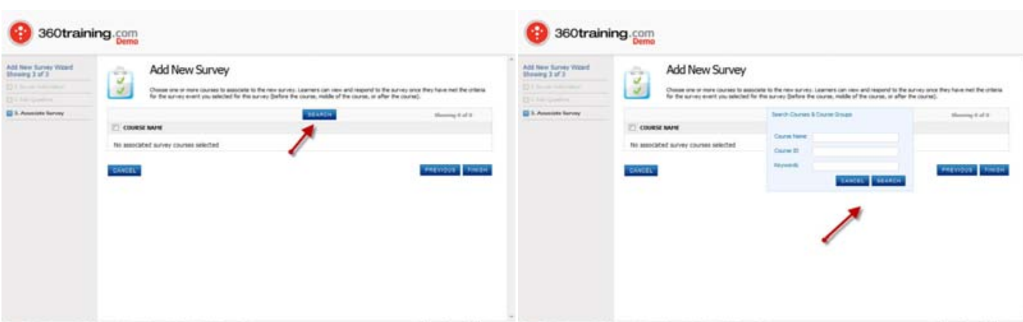


Figure 117: Search for courses to associate.

A search dialog box will be activated. It will ask for the survey name, status (all, published, unpublished), and whether or not you would like to retire the survey.

Once you have located the course(s) you would like to associate with the survey, select the course(s) and press Finish FINISH.

RETIRE SURVEY

Once you have searched and located the survey you would like to retire, click the Retire Survey button RETIRE SURVEY.

Figure 118: Select and retire a survey.

Comment [ovhw69]: the Show All button doesn't.

This will activate a confirmation screen to prevent accidental deletions.

Figure 119: Retire survey confirmation.

Press OK and the survey will be deleted. You will remain on the Surveys page and the next survey on your list will appear.

Comment [ovhw70]: correct?

Assign Surveys

To assign surveys, click the Survey icon  at the top right of the page. Then, click the Assign Surveys tab on the left navigation bar.

Figure 120: Locate Assign Surveys area.

Surveys are assigned in six sequential steps:

1. Select Assignment Method
2. Select Learners or Groups
3. Select Surveys
4. Select Survey Dates
5. Select Survey Settings
6. View Results

Select Assignment Method

Select Assignment Method allows you to select whether the survey will be assigned to learner(s),an organization group, or a learner group. Select an assignment group and press Next NEXT.

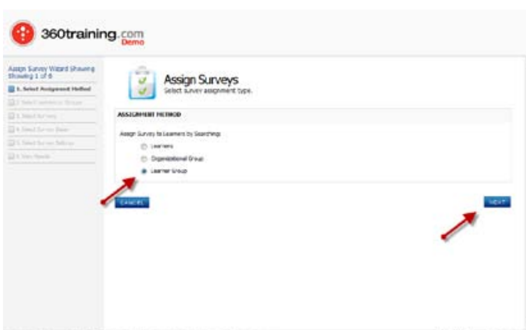


Figure 121: Select Assignment Method.

Select Learners or Groups

Once you have selected an assinment method, you will be allowed to select one or more learners or groups from the method you have selected. All members you assign within the category you have selected will receive the assigned survey(s). If you would like to select all of the members of your chosen category, click on the box to the left of the category name. If you would like to select only certain members, select each using the check box to the left of the member name. When you have made your selections, click Next NEXT.

Figure 122: Assign Users or Groups.

Select Surveys

Select a survey by clicking Search . This will activate a search dialog box that will allow you to search for the survey(s) you would like to assign.

NOTE: The search field does not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering “in” would render names such as ***In***ternational Business or Modern Medic***in***e.

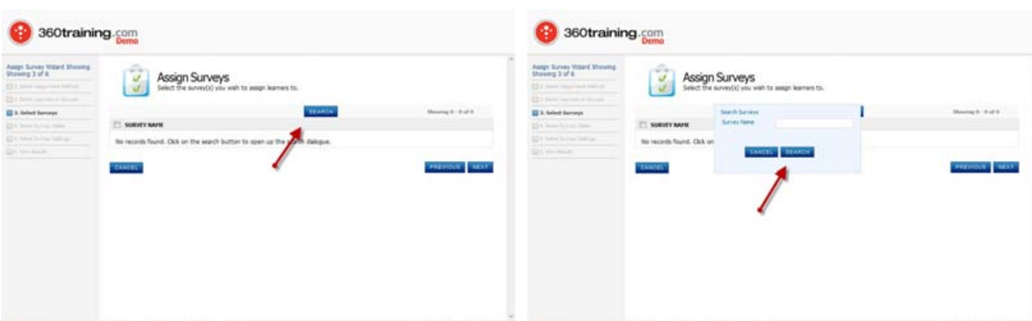


Figure 123: Search for surveys to assign.

Once you have located the survey(s) to assign, select the survey(s) and clicking Next . To select all surveys listed, check the box next to “Survey Name” at the top of the list.

Figure 124: Select Surveys.

Select Survey Dates

Here, you enter the opening and close dates for the survey. Learners will have access to the surveys for the dates you enter. You can choose one of three options:
Open Survey – to assign surveys with no expiration date.
All Surveys – to assign a single date range for all surveys selected.
Individual Surveys – to assign unique open and close dates for each individual survey.
Select a survey date option and provide the relevant information then hit Next NEXT.

Figure 125: Select Survey Dates.

Select Survey Settings

Select Survey Settings allows you to determine whether or not the system will notify you upon confirmation, upon completion, and/or send a survey notification to learners. Make your selections and press Finish FINISH.

Figure 126: Assign Surveys – Select Survey Settings.

View Results

The Assign Surveys – View Results page confirms that the assignment process has been started and provides a summary of survey assignments. Summary information includes the number of learners selected and the number of surveys selected.

At this point, The survey assignment process has been started. This may take 10-15 minutes to complete, depending upon how many students you are assigning. An email confirmation will be sent to your email address once the process has been completed.

Figure 127: Assign Surveys - View Results.

Comment [ovhw71]: capitalization is off on the summary.

When you have completed your review of the summary, click OK and you will be returned to the main Manage Surveys page.

Announcements

Announcements are sent in four sequential steps:
Select Groups or Learners
Send Email to Learners
Send Email
Confirmation

Select Groups or Learners

Select Groups or Learners to receive announcement and press Next .

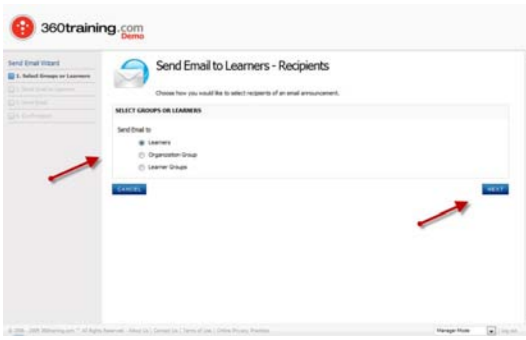


Figure 128: Select groups or learners to receive announcement.

Send Email to Learners

Search for the Learner(s) or Group(s) by clicking Search . This will activate a search dialog box that will allow you to search for the Learner(s) or Group(s). When you have made your selection, hit Next .

NOTE: The search field does not have to be filled completely. For example, using only a few letters in a name will provide a list of all names that contain that letter sequence; such that, entering "in" would render names such as ***In***ternational Business or Modern Medic***in***e.

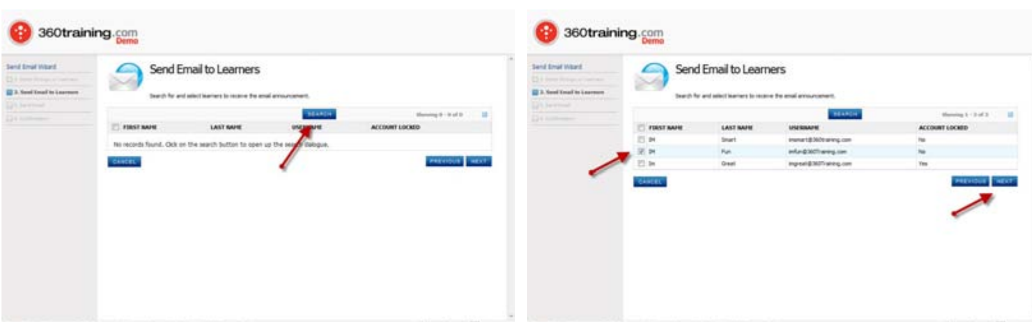


Figure 129: Announcements – Search for Learner(s) or Group(s).

Send Email

The Send Email to Learner - Email Message allows you to compose a personal email message. Fill out the body of the email and the email announcement will be sent to the selected learner recipients. When you have composed your message, hit Finish .

Figure 130: Compose announcement.

Confirmation

If your email was successfully sent, you will receive a confirmation screen. Hit OK to return to the Manage Surveys main page.

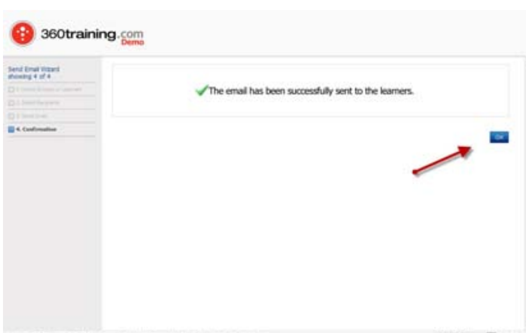


Figure 131: Announcements – Confirmation.

Profile

To access profile information, click the Profile icon on the upper right of the screen. This takes you to the Customer Profile screen.

Figure 132: Access Profile area.

Customer Profile – Organization Information

This area allows you to create or revise the Customer Profile details information about your organization. Three fields are required: Name (organization name), and the first and last name of the organization's primary point of contact. Once you have completed these fields and any other that you would like to detail press Save SAVE.

Figure 133: Customer Profile.

Customer Preferences

Locate the Customer Preferences area by clicking the Profile icon PROFILE then clicking the Customer Preferences tab on the left navigation bar.

Figure 134: Locate Customer Preferences.

Edit Default Learner Preferences

Edit Default Learner Preferences allows you to adjust the following preferences.
Audio
Captioning
Bandwidth
Video
Registration Emails
Enrollment Emails

When you have completed your adjustments, hit Save SAVE.

Figure 135: Edit Default Learner Preferences.

Customer Support

Your satisfaction is important to us. For technical assistance, other inquires or to provide feedback, please call the 360training.com 24 – 7 Customer Support line at +1-800-442-1149.

If you have any requests for technical or instructional support, please contact the 360training Support Department, by email at support@360training.com or by calling toll free: 1-888-360-8771 begin_of_the_skype_highlighting 1-888-360-8771 end_of_the_skype_highlighting.

Your satisfaction is important to us. For technical assistance, other inquires or to provide feedback, please call the 360training.com Support Department via our 24 – 7 live Customer Support line at +1-800-442-1149, Skype at 1-888-360-8771 or email support@360training.com.

Comment [ovhw72]:

Comment [ovhw73]: This was part of a course orientation, while the info above was on the login page. Would you like to include both?

Comment [ovhw74]: If you want the two combined, here it is.